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## Performance Monitoring

### **Session 4**

# **Performance Management Plans**

**What Are They?**  
**Why Do We Use Them?**  
**Where are we?**



## Session Objectives

**By the end of this session, participants should be able to:**

- Understand how the performance monitoring components we've discussed come together in the Mission-wide Performance Management Plan (PMP)
- Understand where the USAID/Jordan Mission is with their PMP
- Plan for next steps in USAID/Jordan Mission PMP completion

## What is a Performance Management Plan (PMP)?

- Tool to plan and manage the process of monitoring, evaluating, and analyzing progress toward achieving results
- The PMP is a **living document**



Source: USAID/AgriFUTURO

## Why Develop a PMP?



### MISSION PERFORMANCE MANAGEMENT PLAN

- Analyze progress on achieving Results identified in a CDCS and in Project LogFrames
- Plan, manage, and budget for data collection, evaluations, and strategy analysis
- Provide a complete picture of how the CDCS and Projects will be monitored and evaluated
- Provide data for Portfolio Reviews and other learning activities
- Inform decision-making, resource allocation, evaluation questions, and portfolio adjustments



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## What are the components of a PMP?

Required

I. CDCS Results Framework Graphic

II. Performance and Context Indicator Summary

III. Data Quality Assessment Procedures

IV. Evaluation Plan

V. Performance Monitoring (and Evaluation) Task Schedule

VI. Annex: Performance Indicator Reference Sheets (PIRS)

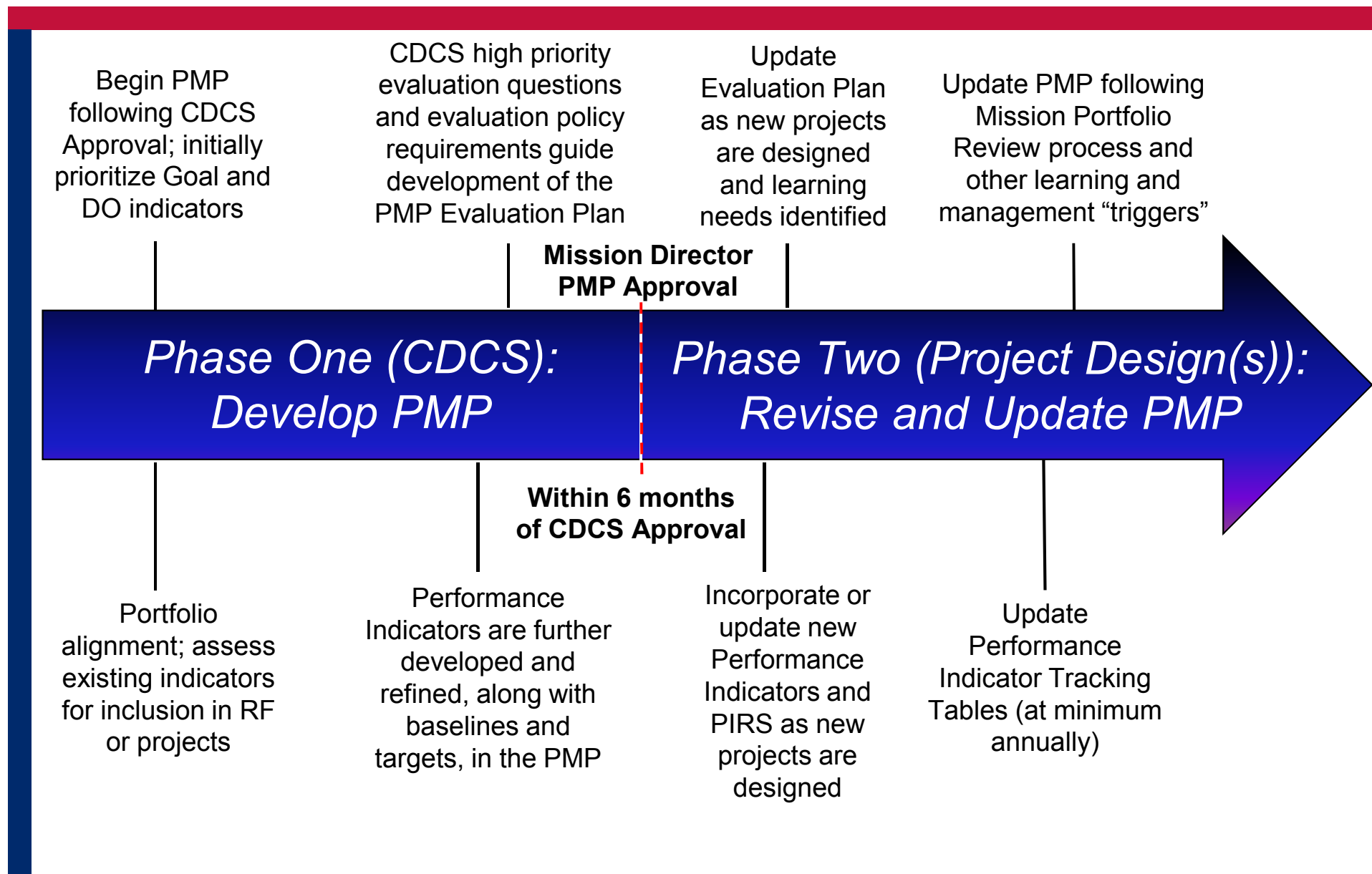
Optional

VII. Performance indicator tracking tables (database/electronic system)

Other (e.g. PMP budget, Learning Plan)

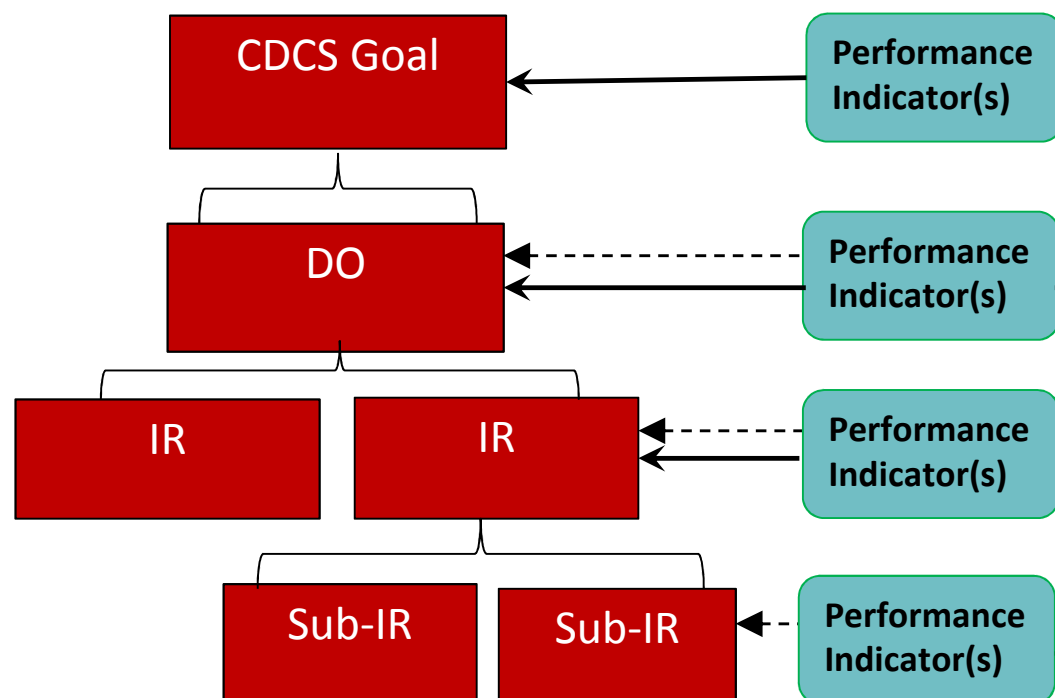


## When is the PMP Created? Development and Revision Process

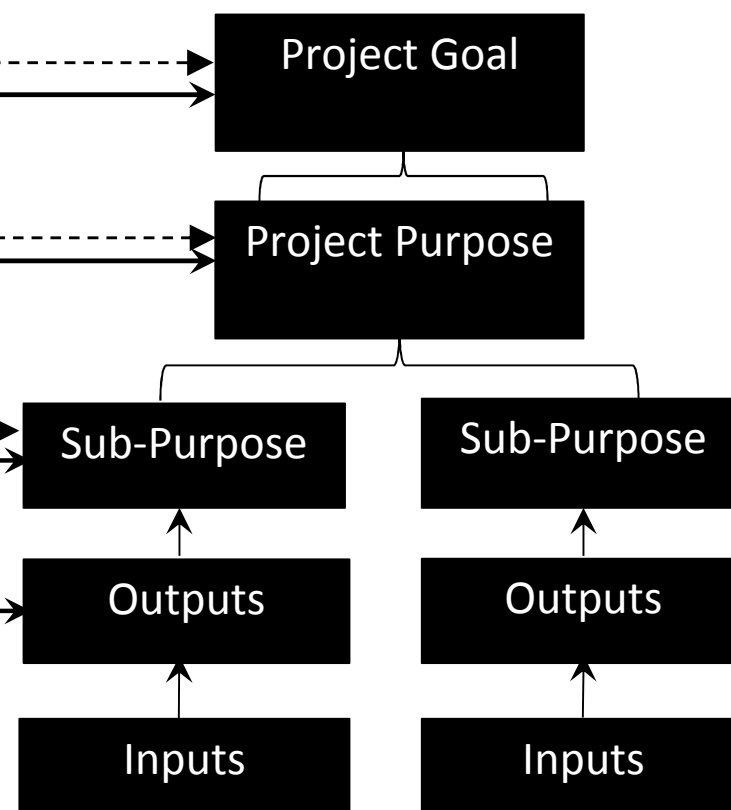


# How the CDCS is Operationalized and Monitored

## CDCS Results Framework

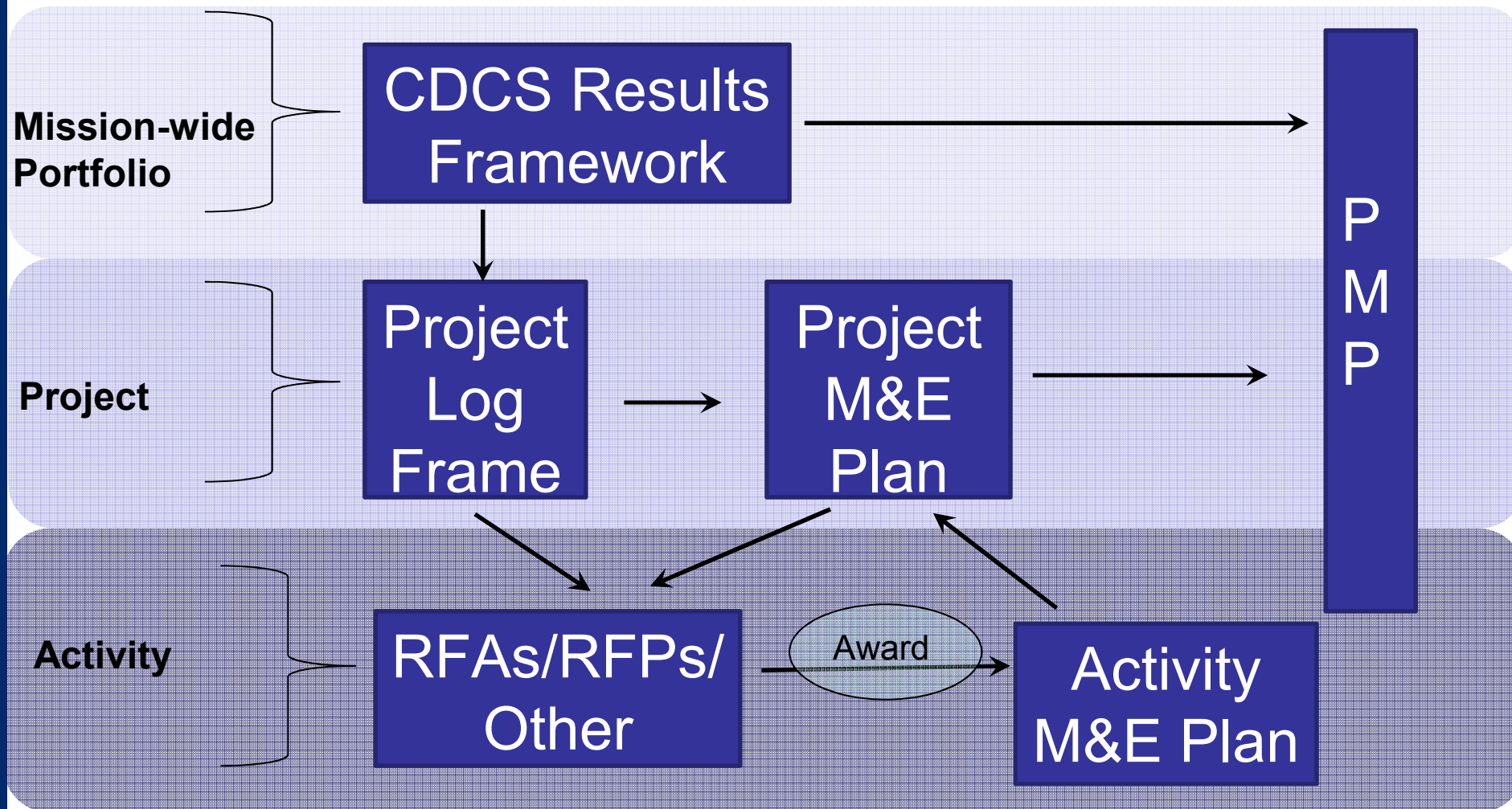


## Project Logical Framework



## Relationship of Project and Activity M&E Plans to the PMP

### Key Planning & Performance Monitoring Tools







## Relationship of Project and Activity M&E Plans to the PMP

	Mission PMP	Project M&E Plan	Activity M&E Plan
What is it?	Mission-wide tool to plan and manage the process of monitoring, evaluating, and analyzing progress toward achieving results in the CDCS and Project LogFrame	Tool to measure progress toward planned results in the Project LogFrame; serves as M&E framework for all activities contributing to a project	Tool for planning monitoring and evaluation at the activity/ implementing mechanism level
When?	4-6 months, following CDCS approval	During project design, as an Annex to the PAD	Within 90 days post-award, before activity implementation
Who Develops?	Mission Staff	Project Team	Implementers



## PMP Illustrative Roles and Responsibilities

	Program Office (PRO)	Technical Offices/DO Teams
<b>PMP Management</b>		
<b>PMP Performance Indicators</b>		
<b>Project and Activity M&amp;E Plans</b>		
<b>Data Collection, Assessment, and Quality Assurance</b>		



## PMP Illustrative Roles and Responsibilities

	Program Office (PRO)	Technical Offices/DO Teams
<b>PMP Management</b>	<ul style="list-style-type: none"> <li>Maintains PMP and performance information systems</li> </ul>	<ul style="list-style-type: none"> <li>Shares PMP data with Program Office; enters data, as appropriate, in information systems</li> </ul>
<b>PMP Performance Indicators</b>	<ul style="list-style-type: none"> <li>Leads PMP development &amp; works with technical offices to ensure indicators are defined at the Goal, DO, and IR levels</li> <li>Ensures alignment of indicators with the CDCS and Project LogFrames</li> </ul>	<ul style="list-style-type: none"> <li>Develops/defines indicators at DO, IR and sub-IR levels for the CDCS and Project LogFrames</li> </ul>
<b>Project and Activity M&amp;E Plans</b>	<ul style="list-style-type: none"> <li>Confirms project M&amp;E plans align with CDCS RF and the Project LogFrame</li> <li>Ensures relevant indicators and evaluation details are updated in PMP</li> <li>Provides guidance, advice, and early review of activity M&amp;E plans</li> </ul>	<ul style="list-style-type: none"> <li>Prepares project M&amp;E plans during project design process</li> <li>Reviews and approves activity M&amp;E plans from partners</li> </ul>
<b>Data Collection, Assessment, and Quality Assurance</b>	<ul style="list-style-type: none"> <li>Coordinates with COR/AOR to conduct data quality assessment.</li> <li>Report data gathered by technical offices/DO Teams to DC</li> </ul>	<ul style="list-style-type: none"> <li>Ensures partners collect reliable data</li> <li>Reviews and analyzes project- and activity-level performance data</li> <li>Leads data quality assessments and identifies data quality issues</li> </ul>



## USAID/Jordan PMP Status

What's been done:

- Results framework revisions
- Indicator selection
- Performance Indicator Reference Sheets (PIRS)
- Indicator baseline and targets

Exercise: In your teams, review the results framework and come up with 2-3 questions, comments or observations



## USAID/Jordan PMP Next Steps

What's next?

- Work with implementing partners to create Activity PIRS
- Determine indicators for reporting in PPR
- Conduct Data Quality Assessments (DQAs)



## USAID/Jordan PMP Next Steps

### Activity PIRS

- Developed or adapted by implementing partners
- May include activity specific details additional to the PMP PIRS

### MUST

- be included in their AMEP
- consist of a detailed definition, method of calculation and data collection methodology
- include baseline and targets



## USAID/Jordan PMP Next Steps

Performance Indicator Reference Sheets (PIRS) are the complete detailing of the indicator - who, what, why, when, where, how, how much, and baseline and other aspects.

Completing PIRS is essential and most M&E designers find that only in completing these can “a good idea” for an indicator be made fully workable. It is usually a “reality test” and critical for eventual DQA.

USAID Performance Indicator Reference Sheet
Name of Result Measured (Goal, DO, IR, sub-IR, Project Purpose, Project Output, etc.):
Name of Indicator:
Is this a Performance Plan and Report indicator? No ____ Yes ____ for Reporting Year(s) ____
If yes, link to foreign assistance framework:
DESCRIPTION
Precise Definition(s):
Unit of Measure:
Disaggregated by:
Rationale or justification for indicator:
PLAN FOR DATA COLLECTION BY USAID
Data Source:
Method of data collection and construction:
Reporting Frequency:
Individual(s) responsible at USAID:
DATA QUALITY ISSUES
Dates of Previous Data Quality Assessments and name of reviewer:
Date of Future Data Quality Assessment:
Known Data Limitations:
TARGETS AND BASELINE
Baseline timeframe:
Rationale for Targets:
CHANGES TO INDICATOR
Changes to indicator:
Other Notes:
THIS SHEET LAST UPDATED ON:

# Exercise

**15 minutes in groups; 10 minutes discussion**

- Review the example Activity PIRS provided. In your group identify the following:
  - The What: what are they measuring? Do you have enough information in order to determine that? Is there information missing?
  - The Who: Who is collecting the data?
  - The When: How often does data collection happen?
  - The Why: Why is this indicator important and how will the information be used?
- What would you do to improve this Activity PIRS?
- Be prepared to report back on your findings.





## USAID/Jordan PMP Next Steps

### DQAs

- Purpose: determine the extent to which the data can be trusted
- Required every 3 years for any data reported externally (PPR, narratives, etc)

### Common data quality issues

- Inappropriate indicators for intended results
- Inadequate, inconsistent, and/or untimely data

So what's next?



## USAID/Jordan PMP Next Steps

Step 1: Identify indicators that require a DQA (in partnership with PRO)

- PPR Indicators
- Narrative indicators
- Data that is often requested by Washington

Step 2: Develop an overall scope and schedule

Step 3: Communicate with partners/stakeholders regarding site visits for DQAs

Step 4: Conduct IP office visits and other site visits to review elements of data quality that can only be assessed in field (half-day)



## USAID/Jordan PMP Next Steps

Step 5: Complete DQA checklist for each indicator and each IP (see handout)

Step 6: Write up findings and recommendations

Step 7: Share draft report with PRO for feedback

Step 8: Solicit and incorporate IP responses and action items

Step 9: Submit final report for clearance